



THE JACOB RADER MARCUS CENTER OF THE  
**AMERICAN JEWISH ARCHIVES**  
A DIVISION OF HEBREW UNION COLLEGE – JEWISH INSTITUTE OF RELIGION

**MS-831: Jack, Joseph, and Morton Mandel Foundation Records, 1980-2011.**

Series F: CIJE Accrual, 1981-2011, undated.  
Subseries 2: Dan Pekarsky, 1981-2011, undated.

---

Box  
73

Folder  
4

Change Think Tank. Meetings (Folder 3 of 4), 1997-1998.

For more information on this collection, please see the finding aid on the  
[American Jewish Archives](http://AmericanJewishArchives.org) website.

INSTITUTIONAL CHANGE THINK-TANK  
PRECIS OF AUGUST 19, 1998 MEETING

INTRODUCTORY (DP) 9:30 - 10

**Mission of Think-Tank:** Progressive refinement of an approach to institutional change, with special attention to Synagogues, accompanied by and/or culminating in forays into the field, designed to test, refine, and add to our ideas.

**Last time's agenda:** As against an initial temptation to develop an approach to change based on scrutiny of approaches found in a variety of human domains, it was suggested that we begin our work by trying to surface what we currently believe. This gave rise to the heart of our first session: Articulation of some CIJE beliefs concerning the process and aims of institutional change (Building Blocks document); a survey of extant approaches to Synagogue change, with attention to strengths and weaknesses, and identification of a rudimentary CIJE approach to change, understood as the springboard to our own deliberations across the year.

**Fruitful future directions identified at end of our first meeting:** It was suggested that it might make sense to organize future sessions of the Think Tank around particular phases of the process laid out by KAB. It was also felt that it might be instructive for us, individually and as a group, to do "some inner work" -- to struggle together in a fruitful with the kind of question that we hoped members of a Synagogue would struggle with: What is the nature of the synagogue that would meet our needs as Jewish human beings and families?

**Agenda for this meeting:** Based on these various considerations, Nessa and I, in consultation with Karen, thought it would be useful to focus our second meeting on the problem of vision: to undergo together element of a process of identifying a compelling synagogue vision that is grounded in an encounter with Jewish ideas and opportunities to grasp these ideas experientially, followed by reflection on that process and its implications for our work.

**Rationale for this decision:** The centrality of vision -- of vision grounded in an encounter with powerful Jewish ideas -- is perhaps the most distinctive feature of CIJE's approach to institutional change. It needs to be at the heart of our thinking about Synagogue change.

In addition, the focus on vision would help us get clearer concerning several matters raised at or in the aftermath of our first session. For example:

- 1) What is the process through which the "visioning" described in KAB's document arises and what are its critical elements? How open-ended is it, and what role, if any, do outsiders have in shaping this process or its outcomes?
- 2) KAB's document describes visioning and study as separate elements: what is the relation between these activities in the change-process?
- 3) Who are critical stake holders who are to participate in the process of shaping a guiding vision,

and to the extent that they represent but a sub-group of the membership, what provisions are necessary to ensure widespread identification with the vision?

4) While KAB's articulated process emphasized the need to develop a vision and to trace out its implications for practice, what can or ought to be done to make it likely that effective practical efforts that transform Synagogue life will follow the effort to identify these implications?

5) Is there a single neutral institutional change-process, or should the process of change be organically connected to and reflect the informing vision?

**Organization of the day:** Reflect on a Synagogue vision by reflecting on the kind of vision that might emerge from the perspective of a significant Jewish thinker -- in this sense an attempt to integrate study, visioning, and programmatic implications. Why Heschel? Heschel as one of several significant Jewish thinkers who speak in powerful ways to many contemporaries -- including ourselves.

DP at an early stage: disinterested in Heschel -- thought of him as "watered-down Buber": "radical amazement" as "I-Thou"; but nothing could be further from the truth: a) accessibility of the writing; audience; b) central role of observance and fixed prayer in Heschel's outlook. At this point: find Heschel very inspiring; gives meaning to Shabbat, etc.

What we will be doing: examine and react to some Heschelian-passages in Chevruta.

Later, building on this activity and your reading, try to imagine the kind of person Heschel might try to nurture through Jewish life and the kind of Synagogue that would be appropriate to the cultivation and existence of that person -- and how that vision of Jewish life does and does not resonate with our aspirations and needs.

But: there is another critical dimension to grappling with Heschel's ideas -- one that is less cognitive and more experiential. Our hypothesis: this is a critical dimension of encountering a thinker's ideas. And with this, I turn our session over to Nessa.

A JOURNEY THROUGH LANGUAGE (NR) 10 - 10:30

BACKGROUND TO CHEVRUTA: REMIND YOU OF SOME CENTRAL HESCHEL THEMES IN A SOMEWHAT PERSONAL VEIN (DP) 10:45 - 11

e.g. Keva/kavanah; from textbooks to text people; radical amazement; Shabbat; social action.

## ABRAHAM JOSHUA HESCHEL: THE DAILY AND THE HOLY (10:30 - 11:30)

INTRODUCTION by DP emphasizing Keva/Kavana; from textbooks to text people; radical amazement, Shabbat, and social action.

THEN: Two passages are examined in groups of 3, with attention to the following questions:

1. How do you understand what he is trying to say?
2. What do you find interesting or powerful in what he is saying? What's resonant?
3. How do these passages connect with what you've experienced in Jewish (or other settings)?
4. Return to the larger group with one or two major issues, questions, or insights evoked by your discussion.

## CHEVRUTA FOLLOW-UP (EH) 11:30 - 12:15

1. Elicit responses to #4.
2. Use responses to clarify how Heschel's position relates to and differs from other significant philosophical positions.

LUNCH 12:15 - 1:00

## TRANSLATING HESCHEL INTO A SYNAGOGUE ENVIRONMENT 1:00 - 1:45

In Hevruta (or two sub-groups), participants respond to the following questions.

A. As an Heschelian:

1. What kind of Jewish human being would you hope to cultivate and address in your congregation? What is this person's nature and towards what kind of a Jewish life ought he or she to aspire?
2. What kinds of activities and contexts would be most strongly represented in the Synagogue's brochure and budget?
3. What kinds of professionals (embodying what kinds of skills and sensibilities, and professional aspirations) would one find in this institution?
4. What would be the principal emphases/priorities in the education of children and young

people??

5. Describe the settings for and character of Tfillot.
6. Given that praying is very difficult for many contemporary Jews, what would this Synagogue do to nurture praying Jews?
7. How would Shabbat be structured in the life of this Synagogue?

#### **UNPACKING THE TRANSLATION EXERCISE 1:45-2:45**

- A. Share findings from small groups.
- B. To what extent does the Synagogue you've described resonate with your own sensibilities and needs and those of contemporary Jews?

#### **REFLECTING ON THE PROCESS UNDERGONE 2:45 - 3:45**

1. The process we planned is intended to involve inter-related opportunities for honest introspection, for encountering and responding to powerful Jewish ideas, and for tasting that to which these ideas refer. We imagine that, in a Synagogue change process, this activity would differ from what we tried to do today in that a) it would be more sustained, and b) it would take place in relation to more than one thinker. The hypothesis is that such activities, combined with other inputs, will give rise to a compelling vision. To what extent would this kind of approach meaningfully respond to the challenge of "envisioning informed by study and powerful Jewish ideas"?
2. In a synagogue context, who would be the appropriate participants in the kind of envisioning-process? Would Heschel answer this question differently than you would?
3. What implications would landing on a Heschelian vision have for the overall process, and particular phases, of synagogue change identified by Karen? For example, what implications would this vision have for the challenges of governance, leadership development, and evaluation?

#### **NEXT STEPS 3:45 - 4**

#### **A SECOND JOURNEY THROUGH LANGUAGE (NR) 4 - 4:30**

**Emergent Issues (mentioned at or in aftermath of our first session):**

- 1) The need to identify and introduce into the deliberations of the Think Tank the site-coordinator who will oversee efforts to test out our approach to change in concrete settings.
- 2) Based on the richness of KAB's account, some felt that, as a way of learning, it might be desirable to launch some forays into the field this year rather than wait until the end of the Think

Tank's deliberations.

3) What is the relationship between the Think Tank's work and that of the Synagogue Change Research Project guided by Lisa Malik?

4) What is the problem to which this change-process is supposed to be a response? Whose problem is it? Would there be an interest in the kind of process which we are proposing?

5) What kind of evaluation (and by whom) is assumed in KAB's conception?

6) The issue of governance: What is the composition of the group that steers the change-process? How are they selected? What is their role? And what provisions will be built in to avoid the development of a gap between this "leading vanguard" and the mass of constituents?

7) What is the process through which the "visioning" described in KAB's document arises and what are its critical elements? How open-ended is it, and what role, if any, do outsiders have in shaping this process or its outcomes?

8) KAB's document describes visioning and study as separate elements: what is the relation between these activities in the change-process?

9) Who are critical stake holders who are to participate in the process of shaping a guiding vision, and to the extent that they represent but a sub-group of the membership, what provisions are necessary to ensure widespread identification with the vision?

10) While KAB's articulated process emphasized the need to develop a vision and to trace out its implications for practice, what can or ought to be done to make it likely that effective practical efforts that transform Synagogue life will follow the effort to identify these implications?

11) Is there a single neutral institutional change-process, or should the process of change be organically connected to and reflect the informing vision?

→ Leah  
- Nessa

## TRANSLATING HESCHEL: AN ENVISIONED SYNAGOGUE INSPIRED BY HESCHEL

As a person identified with Heschel's understanding of Judaism and the human condition:

- X 1. What kind of Jewish human being would you hope to cultivate and address in your congregation? What is this person's nature and towards what kind of a Jewish life ought he or she to aspire?
2. What kinds of activities and contexts would be most strongly represented in the Synagogue's brochure and budget?
3. What kinds of professionals (embodying what kinds of skills, understandings, sensibilities, and aspirations) would one want in this institution?
- X 4. What would be the principal emphases/priorities that would guide the education of children and young people? *Prophets/wrestling is ok a y/evg-cup of wonder*
5. Describe the settings for and character of Tfillot.
- X 6. Given that praying is very difficult for many contemporary Jews, what would this Synagogue do to nurture praying Jews?
7. How would Shabbat be structured in the life of this Synagogue?

GROUP A: Address questions 1, 4, and 6

Group B: Address 1, 3, and 7

Time permitting, when you have addressed these questions to your satisfaction, feel free to identify other significant features of a Heschel-inspired synagogue.



## REFLECTING ON THE PROCESS UNDERGONE

1. The process we planned is intended to involve inter-related opportunities for honest introspection, for encountering and responding to powerful Jewish ideas, and for tasting that to which these ideas refer. We imagine that, in a Synagogue change process, this activity would differ from what we tried to do today in that a) it would be more sustained, and b) it would take place in relation to more than one thinker. The hypothesis is that such activities, combined with other inputs, will give rise to a compelling vision. To what extent would this kind of approach meaningfully respond to the challenge of “envisioning informed by study and powerful Jewish ideas”?

2. In a synagogue context, who would be the appropriate participants in the kind of envisioning-process? Would Heschel answer this question differently than you would?

3. What implications would landing on a Heschelian vision have for the overall process, and particular phases, of synagogue change identified by Karen? For example, what implications would this vision have for the challenges of governance, leadership development, and evaluation?

4. Ellie's map → Diagnosis  
Strategy  
Target, etc

## UNDERSTANDING AND RESPONDING TO HESCHEL

As you work together in Chevruta, the following questions may prove useful guides in thinking about the two passages from Heschel's writings.

1. How do you understand what Heschel is trying to say in each of these passages?
2. What do you find interesting, powerful, and/or difficult in what he is saying? What's resonant? What might you want to ask Heschel about the ideas expressed?
3. How do the ideas expressed in one or both of these passages connect with your experiences in Jewish (or other) settings?

When we re-convene as a larger group, please be prepared to talk about one or two major issues, questions, or insights that emerged in your conversation.

---

① In the mundane is also the sacred:  
-- or the amazing!!  
OR is the mundane  
potentially sacred.

---

When are communal dimensions  
of Prayer?  
The Communal

~~ink~~

jeppit?  
D/A/C  
NIC

In the window a white the secret

of the window  
for only 2000

or the window

the commercial  
of property  
was on a commercial business

To: Participants in CIJE's Think Tank on Institutional Change  
From: Dan Pekarsky and Nessa Rapoport  
Re: Our August 19 session  
Date: August 4, 1998

Enclosed are background-materials for our August 19 meeting, which will be held at CIJE from 9:30 a.m. to 4:30 p.m. We have included a fairly extensive summary of our last discussion, which highlights issues that were identified, along with the materials around which that discussion was organized. Also included are some writings by or about Abraham Joshua Heschel, on whose work we will be focusing on August 19. The rationale for this focus will be explained below.

As you may recall, and as the meeting-summary suggests, the sense of our group on April 29 was that it would be valuable to look in greater depth at some of the critical phases of the change-process described by Karen Barth. Among these phases, there seemed to be a special interest in the one associated with the development of a guiding vision. This interest seemed to have two dimensions: first, many of us felt that a distinctive and valuable CIJE contribution will be the development of an approach to the problem of vision that is deeply respectful of the voices of critical institutional stake holders **and which also** involves, as an integral component, challenging encounters with powerful Jewish ideas; second, many of us felt that it would be important and also exciting for our own group to do what was called "inner work:-- to grapple ourselves with some of the difficult questions concerning vision that we hoped participants in an institution would address in the Contest of a change-process. How, it was asked, might we ourselves, both as a group and individually, approach the challenge of articulating a compelling synagogue vision, and might our effort to do this teach us something important that would illuminate the work of this Think Tank?

These considerations have shaped the agenda for our August 19 meeting. Through a set of activities that will include an effort to think, both individually and together, about the kind of synagogue-vision that might excite us, we will have an opportunity to develop insights and raise questions concerning the process through which a synagogue-community might develop a powerful guiding vision. Because we believe that the process of envisioning an exciting synagogue can be profoundly enriched through the encounter with Jewish content, we thought it essential to incorporate into our conception of the day a chance to wrestle with the ideas of a powerful Jewish thinker, with attention to their implications for a vision of Jewish life and synagogue design. Because we think that his views speak to the concerns of many in our generation, we decided to look at Abraham Joshua Heschel at our upcoming meeting; but we recommend focusing on him with the expectation that in subsequent meetings we will encounter very different but equally powerful thinkers, and consider the implications of their ideas for our work. More strongly, we think it essential that the effort to envision a thriving synagogue include opportunities to wrestle with very different kinds of perspectives.

We are excited about the chance to think about Heschel, about our own visions of Jewish and synagogue life, and about the relevance of all this to the work of the Think Tank. In preparation for our meeting please try to read the essays authored by Heschel and "Carl Stern's Interview with Dr. Heschel". The essay by Laurence J. Silberstein is included in case you are interested in a comparative and somewhat theoretical discussion of Heschel's ideas.

All the best until the 19<sup>th</sup>.

Summary of Presentation on

*SYNAGOGUE CHANGE PROCESSES*

Change Think Tank  
April, 1998

---

## ***DETAILS OF PROPOSED CHANGE PROCESS***

<b>Stage of Process</b>	<b>Objective</b>	<b>Ideas</b>
Readiness	Assess and build readiness for change	<p>Writing why they want to change</p> <p>Congregation visioning day</p> <p>Telling them the tough truth about change</p> <p>Learning about <u>our</u> vision</p> <p>Visits to the “best practice” sites</p>
Study	<p>Change culture/mind-set</p> <p>Form the basis for a new vision</p>	A curriculum of Jewish text and ideas, educational ideas, etc. for study and reflection
Research	Ground the approach in reality	Focus groups and parlor meetings
Vision #1	Articulate a inspirational vision for the congregation	A series of workshops on vision
		Involve the congregation in the process

<b>Stage of Process</b>	<b>Objective</b>	<b>Ideas</b>
Mini-initiatives	Develop a few “forays” into the world of change	Study of what others have done  Set up a few initiative task forces
Strategies	Develop 2 – 3 strategies for broad-based change	Hold a strategic planning retreat or retreats
Implementation planning	Develop a practical plan for implementing the strategies	Work with existing structures to plan action steps, human resources, and funding
Implementation	<b><i>Do it!</i></b>	
Evaluation	Assess how well the changes are working	A survey instrument (pre- and post-)
Vision #2	Revisit the vision	Another workshop then involve the congregation

***SYNAGOGUE CHANGE PROCESSES I'VE KNOWN***  
 (my very subjective opinions)

<b>Project</b>	<b>Strengths</b>	<b>Weaknesses</b>
McKinsey	<ul style="list-style-type: none"> <li>• Market research</li> <li>• Strategic orientation</li> </ul>	<ul style="list-style-type: none"> <li>• No content except business ideas</li> </ul>
ECE	<ul style="list-style-type: none"> <li>• Interaction between synagogues</li> <li>• Medium is the message</li> <li>• Strong process</li> </ul>	<ul style="list-style-type: none"> <li>• Not enough educational vision</li> <li>• Not enough content</li> </ul>
Synagogue 2000	<ul style="list-style-type: none"> <li>• Experiential</li> <li>• Great study itinerary</li> <li>• A vision (but weakly articulated)</li> </ul>	<ul style="list-style-type: none"> <li>• Weakly articulated process</li> <li>• Not enough consulting support</li> <li>• Hard to get beyond the “change club”</li> </ul>

## **Appendix**

Materials Central to April 29 Meeting.

1. Some Building-Blocks of a CIJE Approach to Synagogue Change
2. Change Philosophy and Emerging Ideas on Strategy
3. Summary of Presentation in Synagogue Change Processes

## SOME BUILDING-BLOCKS OF A CIJE APPROACH TO SYNAGOGUE CHANGE

Daniel Pekarsky, April 1998

### INTRODUCTION

Embedded in CIJE's discourse are a number of principles that are relevant to institutional change-efforts (be they in schools, Synagogues, or any number of other Jewish educating institutions); while these principles may not tell us what to do in any very concrete sense, a number of them represent criteria or standards that need to be satisfied if a change-process and its outcomes are to be in our judgment adequate. Based on various consultations, informal conversations, conferences and other activities that a number of us have been engaged in, below I attempt (in a less than systematic or comprehensive way) to identify some of these principles. Many of these points are treated at somewhat greater length in the two accompanying papers dealing with vision and education; both of these papers grew out of conversations within the CIJE/Mandel Institute worlds. You are encouraged to highlight unclarities, to assess whether I am correct that these principles have been central to our thinking, to articulate doubts, and to identify principles and concerns not herein articulated that should have been.<sup>1</sup>

### PRINCIPLES

1. We understand a Synagogue as an educating institution or learning community. Its various contexts and activities - ranging from formal educational arrangements to board meetings, religious services, communal meals, youth groups, wedding ceremonies, and funerals -- are all to be understood as avenues for the intellectual, spiritual, social and moral growth of its members.
2. A healthy synagogue (or any other educating institution) is organized around a shared and compelling vision that articulates its fundamental *raison d'être* and aspirations and that guides decision-making, policies, and practices down to the institution's very details. Such a vision vividly captures what a thriving synagogue would look like, inclusive of the attitudes, aspirations, dispositions, etc. that mark members of this community.

---

<sup>1</sup> Because my own work has been so closely connected with our Goals Project, the kinds of principles I identify in this document are closely related to the work of that project. This makes it all the more important to add to the list of principles summarized in this paper other ideas that grow out of other phases of our work.

3. An adequate guiding vision for a Jewish educating institution is grounded in convictions embodying powerful ideas concerning the nature and significance of Judaism and Jewish life.

4. The presence of an adequate guiding vision energizes individual and collective activities; creates a sense of community; offers guidance to decision-making across all areas; and provides a basis for evaluating the institution's policies and practices. Though a powerful vision cannot be assumed in advance of a process of change, once it is present it represents an invaluable tool in this process.

5. For this reason, an essential part of a Synagogue's efforts to be a more thriving community must be a serious effort to visit -- or re-visit -- its fundamental nature and purpose, i.e. its vision, with the aim of clarifying the vision and establishing its status as compelling to the key stake holders.<sup>2</sup> It needs to wrestle seriously with the question: What would our Synagogue be like if we were successful? What would a thriving Synagogue look like?

It is, I think, fair to say that as an organization we have been concerned that the effort to clarify the fundamental purposes or vision of educating institutions is too often carried out in too perfunctory a way. While we've had a measure of skepticism concerning quick-and-dirty "visioning-activities", we have struggled with the challenge of how to engage relevant stake holders in a process that is significantly richer and time-consuming.

6. The process of arriving at, or clarifying the vision to which this community is committed should go beyond what is sometimes called "values-clarification." While opportunities for individuals to unearth, to share with one another, and to look for commonalities among, their pre-existing basic convictions are essential, the process of working towards a compelling guiding vision should include serious opportunities to encounter and respond to powerful Jewish ideas and texts that speak, possibly in very different voices, to the nature and significance of Judaism, Jewish life, and synagogues. Rightly chosen and introduced, such ideas and texts have the capacity to raise the level of discourse and to enrich deliberations concerning an adequate guiding vision. This means that the process of developing a compelling vision will work best if it is itself a compelling form of Jewish education that facilitates the growth of the participants.

---

<sup>2</sup> Who the key stake holders are and whether they are the same as those who will enthusiastically support the vision at the end of the change-process is a question left open in this document.

How to infuse the change-process with powerful Jewish ideas in a way that will seem meaningful and relevant to the change process is a critical educational challenge that we have not yet adequately addressed; but we believe that this effort requires both pedagogical good sense and carefully designed materials (articles, exercises, etc.). Efforts, like those undertaken by the Mandel Institute's Educated Jew Project, to develop materials that can be used as part of a serious change-process are to be encouraged.

7. An important component of the process of change is an effort to look honestly and thoughtfully at "what is". This involves several inquiries:

a. At any given time in its history, a vision (or visional elements, more or less clear and compelling, and more or less coherent with one another) are embodied in the culture of an institution -- in its policies, practices, forms of organization, and budgetary commitments. Unearthing the values and assumptions (about education, about Judaism, about children, etc.) implicit in existing practice is an important phase of the process of becoming a more vision-driven institution. In some cases, it will be an ideal starting-point for deliberations concerning what the Synagogue's guiding vision should be.

b. Equally important is the effort to identify the purposes at work in existing practices and policies and, through a process of self-examination, to assess the actual outcomes of these practices and policies.

c. Looking at "what is" includes a careful attempt to understand the perceptions and attitudes of the Synagogue's varied constituencies, including - and perhaps especially - what they take to be problematic in the life of the synagogue. Clarifying "the problem" as understood by different constituencies is essential.

8. As critical as is the effort to clarify the Synagogue's guiding vision is the willingness to deliberate seriously, honestly and imaginatively about what would be required, given current realities, for this vision to be meaningfully reflected in the life of the congregation.

The relation between vision and practice is complex and multi-levelled. Seymour Fox has identified five such levels: these are Philosophy; Philosophy of Education; Theory of Practice; Practice; and Evaluation. Familiarity with these levels and the relationship between them, and the capacity to

shuttle among these levels as one analyzes a particular datum -- e.g. a curriculum, or a conception of an educated person -- can be invaluable to the effort of interpreting and stimulating fruitful discussions concerning an educational reality or idea. Attention to these levels can also be invaluable in the process of translating visional commitments into educational practice.

9. Rich discussions organized around institutional vision accompanied by rich discussions of what it would mean to embody the vision in practice are not enough. Careful attention needs to the process of and obstacles to meaningful implementation.

10. CIJE has at times taken the view that in order for a process of change in a Synagogue to have a fighting chance, the rabbi, the president, and the educational director must be seriously invested in the effort. We have not, to the best of my knowledge, taken a position concerning other constituencies that must be committed to the process, or concerning the percentage of the synagogue-community that needs to support or be actively involved in the process of change, or concerning the kind of involvement that should be expected or encouraged in different constituencies.

11. CIJE's views concerning the role of the Synagogue leadership in the process of change include the following: FILL IN

12. The CIJE approach to Synagogue-change should itself be infused with Jewish ideas about the nature and aims of change, in general, and Synagogue-transformation, in particular.

13. We understand the process of change as an educational process, that is, as a process in which the Synagogue community undergoes growth through 1) careful examination, informed by challenging inputs, of its fundamental convictions, its practices and the relationship between them; and 2) carefully monitored change-efforts, informed by the examination undertaken described in #1. This means that the facilitator of a Synagogue change-process brings with him/her the skills and sensibilities of a talented educator. His/her work requires skills and sensitivities necessary for pedagogical excellence, as well as a strong Jewish knowledge-base that can richly be brought to bear on his/her interpretations of Synagogue realities and on efforts to stimulate fruitful reflection and deliberation.

Like many a talented educator, this individual plays a multitude of roles that range from: a) the Socratic gadfly whose questions and observations highlight inconsistencies, expose and clarify tacit and sometimes uncomfortable assumptions, encourage recognition of and reflection on gaps between espoused ideals, practices, and outcomes, b) a Deweyan educator who is

continually assessing where the learner (the community as a whole or individual members) is and, in light of this, developing educational experiences (made up of questions, content, and activities of a certain kind) that have the power to stimulate appropriate forms of growth. What these forms of growth are (reflecting on the relationship between aspirations and practice; encountering a challenge to one's aspirations, etc.) will depend on an assessment of immediate circumstances; c) a living bridge to powerful Jewish ideas and texts -- a person who is able in a timely way to infuse the deliberations of the Synagogue community with powerful Jewish ideas that enrich their thinking and range of options.

14. The willingness of a Synagogue to undertake a serious change-effort depends on a measure of confidence that fruitful change is possible. Powerful and accessible examples of institutions that have undergone and profited from a serious process of change will prove invaluable in fostering this confidence; so will examples of what we have been calling "vision-driven institutions."

**CHANGE PHILOSOPHY AND EMERGING IDEAS ON STRATEGY**

**FEBRUARY 1997**

## HOW WE BELIEVE INDIVIDUAL JEWS CAN CHANGE

Fundamental Belief	Explanation/Implications
<p>The ultimate goal needs to be to transform the lives of individual Jews; to make being Jewish central to their lives and their quest for meaning.</p>	<p>We need to define success in terms of how we impact the minds and hearts of individual Jews and how that turns into action in their lives.</p>
<p>The "Direct Service" institution is the most important vehicle for changing the lives of individual Jews in North America. It is only by finding a sense of community within these institutions that Jews will become more committed to being Jewish.</p>	<p>Change needs to take place in institutions where Jews interface with Jewish learning and living (e.g., synagogues, schools, camps, JCCs) to make them more relevant and appealing to the majority of Jews. This means transformation of existing institutions. It may also mean building new institutions or creating new types of institutions. Any change program that does not ultimately transform "direct service" institutions is not worth investing in.</p>
<p>Multiple access points are needed to reach different types of Jews.</p>	<p>Change needs to happen across a broad range of direct service institutions to offer a diverse population of Jews the opportunity to connect with the tradition. Any type of institution that has potential to be a site for authentic Jewish learning and living should be included. Therefore focusing on one type of institution (e.g., day schools) is not the total answer.</p>
<p>The effect of multiple positive Jewish experiences on children and adults is synergistic. On the other hand, the effect of scattered, infrequent experiences is often nonexistent.</p>	<p>If resources are limited, it is better to concentrate resources so that they impact on a smaller number of individuals than to spread resources around so that they barely touch the lives of many people.</p>
<p>Family life is critical in the development of Jewish identity and commitment to Jewish living.</p>	<p>Change programs that focus on one age group are going to be less effective than those that focus on all age cohorts. Institutions need to be structured to support Jewish life in families.</p>

## WHAT WE BELIEVE ABOUT HOW INSTITUTIONS CAN CHANGE

Fundamental Belief	Explanation/Implications
Comprehensive Institutional change requires 6 things:	
1) <u>Leadership</u> is the most important factor in bringing about institutional change but (with the exception of the occasional genius) is not usually sufficient to bring about sweeping changes.	There needs to be an improved infrastructure to support the development of stronger lay and professional leadership for Jewish institutions.
2) <u>Vision</u> is the second most important factor. Vision cannot be created in a vacuum but must be supported by an "infrastructure of ideas."	An ongoing dialogue needs to be facilitated between the grassroots and the philosophical thinkers around the development of "big ideas." External facilitators will be needed to help institutions to adapt these ideas to their own situations.
3) <u>Cultural change</u> must be part of any change program. Without a real shift in mind set, change will not be ambitious enough and is unlikely to stick.	Institutional change programs need to explicitly address the culture of the institution. Tools need to be developed to help in this endeavor.
4) An explicit <u>change process</u> is needed as a road map for turning vision into reality.	Carefully specified methodologies need to be developed to help institutions through the difficult process of change. Ongoing evaluation needs to be a central piece of these methodologies.
5) <u>Skill-building</u> is needed to support the new methodologies and approaches initiated by change programs.	Training institutions need to become driven by their own vision of an educated Jewish leader and to build a program around that vision. New training programs or institutions may need to be created.
6) Sufficient and appropriate <u>funding</u> is needed to support a change process at the institutional level.	The funding approaches and methodologies of foundations and federations will have to change to focus resources on leadership development and institutional transformation, and to support longer time frames.

**WHAT WE BELIEVE ABOUT HOW INSTITUTIONS CAN CHANGE - cont.**

**Fundamental Belief**

**Explanation/Implications**

Piecemeal changes in institutions do not work. The whole institution must change from the inside out.

Isolated programs (no matter how good) that are not part of a broader vision of institutional change are unlikely to be effective in bringing about long-term meaningful change, especially when those programs are imposed from the outside. We need to help institutions transform themselves and design pilot programs for themselves that fit their long-term change vision.

The time frame of change is longer than most change programs acknowledge up-front

Transformational change programs need realistic time frames -- at least 5-10 years --and ongoing support throughout that entire period.

## WHAT WE BELIEVE ABOUT HOW CHANGE IS DISPERSED

### Fundamental Belief

There is a model of change called the "S" curve, that is often used to describe the dispersion of technology. While it is not a perfect way of describing changes in educational systems and other highly complex social systems, it is a useful tool for thinking about dispersion of change. It suggests that the process of change has 5 stages (see Exhibit 1)

1. Problem awareness - the growing awareness and understanding of a problem with no real action taking place.
2. Invention - the development of new models and ideas to solve the problem.
3. Adaption - the integration of those new models and ideas into leading edge institutions.
4. Dispersion - The acceptance of the new ideas by the majority of institutions.
5. The institutionalization of the new ideas and the slowdown in the rate of change.

Jewish educational change is at stages 2 and 3.

### Explanation/Implications

The focus of change efforts has to be on the development of models and ideas for change and on the integration of these models into leading edge institutions.

It is better to focus energy and resources on leading edge institutions in order to create effective change models. (i.e. "invest in the best") than to spread resources thinly across all institutions regardless of their readiness for change.

## WHAT WE BELIEVE ABOUT HOW CHANGE IS DISPERSED - cont.

### Fundamental Belief

There is a "tipping point" phenomenon\* that can lead to rapid improvement in results when a critical mass of resources are concentrated in one place.  
(\*see enclosed article)

Change needs to happen in the way that institutions work together as a system.

Change needs to happen in the national infrastructure that supports direct service institutions (i.e. training institutions, movement, foundations)

Federations and central agencies can be an important vehicle (in some cases the most important vehicle) for planning and achieving transformation in direct service institutions. This importance is likely to vary from community to community.

### Explanation/Implications

Change programs are likely to be more effective if they apply enough energy in one place to reach the tipping point.

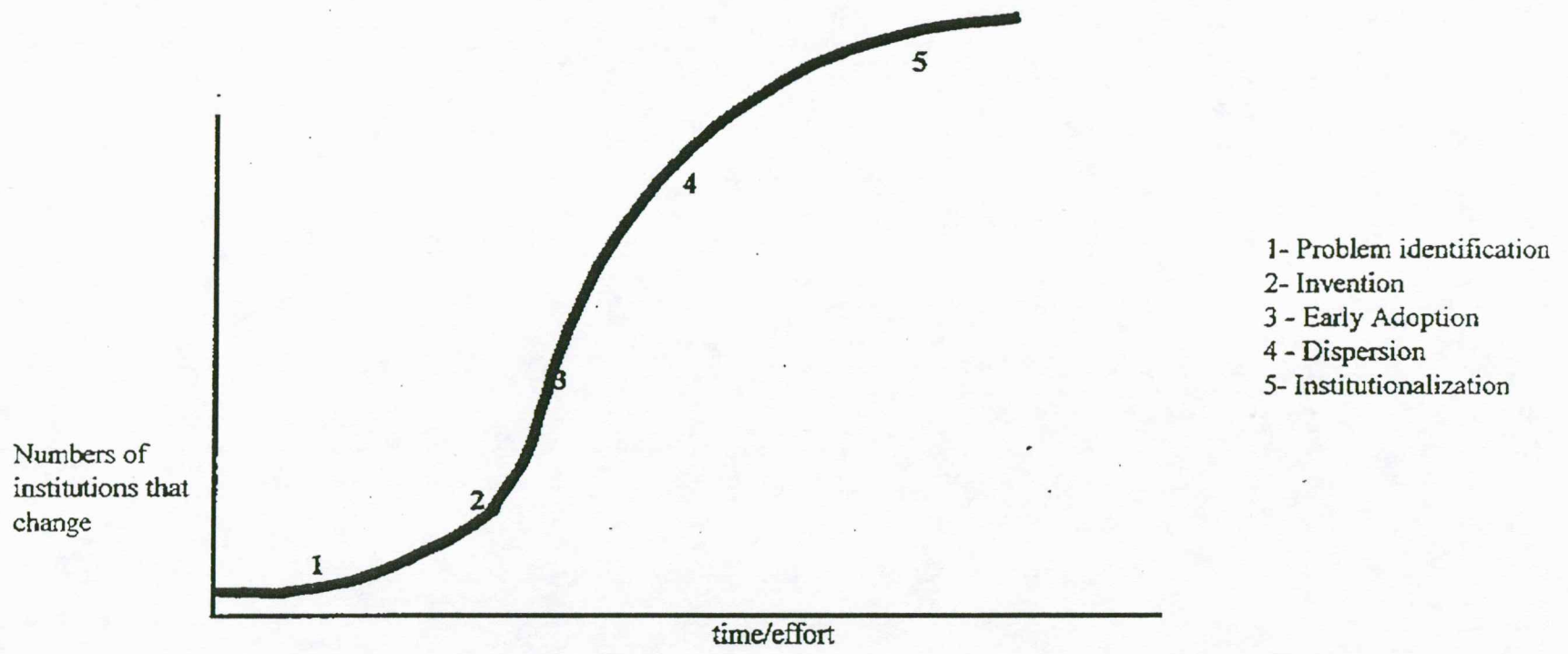
The roles of different institutions and the boundaries between them need to be reconsidered to improve the functioning of the whole system.

National institutions need to develop their own change vision and process for supporting the change efforts of direct service institutions

Each community's landscape needs to be carefully assessed and a strategy developed for change that is specific to that community's situation.

# THE PROCESS OF CHANGE

Exhibit 1



**CIJE INSTITUTIONAL CHANGE THINK-TANK  
MEETING #2: ENVISIONING THE PROCESS OF ENVISIONING  
AUGUST 19, 1998**

**AGENDA**

9:30 - 10      TODAY'S WORK: BACKGROUND AND ASPIRATIONS

10 - 10:30     A JOURNEY THROUGH LANGUAGE

10:30 - 11:30 ABRAHAM JOSHUA HESCHEL: THE DAILY AND THE HOLY  
-- INTERPRETING AND RESPONDING TO HESCHEL

11:30 - 12:15 HESCHEL IN PERSPECTIVE

**LUNCH**

1 - 1:45        TRANSLATING HESCHEL: ENVISIONING A HESCHEL-INSPIRED  
                  SYNAGOGUE

1:45 - 2:45    RESPONDING TO THE TRANSLATION: THE ENVISIONED SYNAGOGUE  
                  AND OUR OWN NEEDS AND ASPIRATIONS

2:45 - 4        STEPPING BACK: THE PROCESS UNDERGONE AND THE WORK OF THE  
                  THINK TANK; NEXT STEPS

4 - 4:30        A JOURNEY THROUGH LANGUAGE

INSTITUTIONAL CHANGE THINK-TANK  
Summary of Meeting #1, April 29, 1998

BACKGROUND

The institutional change think-tank was called into being with the aim of developing a meaningful and usable approach to institutional change -- an approach which we could then experiment with, revise, and refine through forays into the field. Though our interest extends to educating institutions of various kinds, our initial focus will be on synagogues. This emphasis reflects CIJE's belief that the transformation of synagogues is a critical ingredient in the effort to revitalize American Jewish life, as well as our intention of launching a Synagogue Change Project a year from now.

In preliminary conversations concerning the Think Tank, it was projected that the group would meet 5 or 6 times in the course of the year, and that at each meeting, it would have a chance to encounter and learn from approaches to change associated with a particular domain (e.g., general education, the world of corporations, community-change efforts, and existing synagogue-change projects). The challenge would be to assess the relevance of the insights and approaches associated with these other domains to our own work in Jewish education; and, by the end of a year's time, to emerge with a serviceable approach to change that is true to our own convictions and integrates pertinent ideas encountered during the work of the Think Tank.

We also decided that prior to encountering beliefs about and approaches to change associated with other domains, it would be important for us to articulate our own present ideas concerning the process and aims of the change-process. Through subsequent encounters with various approaches to change throughout the year, this body of ideas would then be deepened, revised, or refined.

These considerations led to a decision to devote our first meeting to an effort to articulate CIJE's current approach to change: during the first part of the day, we would focus on fundamental CIJE convictions about the process and aims of change; and in the second part of the day, we would look at a concrete approach to change that reflects some of these ideas as well as Karen Barth's experience in this domain. The day would also include a chance to examine Jewish sources the might inform our thinking about change, as well as an opportunity to think about next steps.

In preparation for the meeting, Dan Pekarsky drafted a short

document that attempted to articulate (what seemed to him) some central CIJE-beliefs concerning change. This document, along with his pieces on the place of vision in educational reform, the two pieces authored by Amy Gerstein for CIJE concerning the change-process, and Seymour Fox's piece on Ramah, were sent to participants prior to the meeting.

Critical to the success of the Think Tank, we realized, was not just our ability to identify articulate representatives of powerful approaches to change in different domains, but also our ability to bring to the table a thoughtful group of individuals bringing rich and complementary perspectives to our conversations concerning these different approaches. We were especially eager to include individuals who are already very sophisticated concerning educational change and individuals who could enrich our discussions with powerful Jewish ideas concerning the process and aims of change. The initial group of participants we agreed on included: a) core-CIJE staff, including Eli Holzer and Lisa Malik; b) members of the Guiding Ideas Study Group ("GUIDES"); and c) Hank Levin. It was understood that it may prove desirable to add other individuals to the group.

The following individuals were able to participate in our first meeting: Karen Barth, Gail Dorph, Amy Gerstein, Cippi Harte, Alvan Kaunfer, Hank Levin, Lisa Malik (via conference-call), Daniel Pekarsky, and Nessa Rapoport.

#### RESPONDING TO SOME FORMULATIONS OF CIJE'S IDEAS CONCERNING CHANGE

After some introductions, participants were invited to spend about ten minutes reviewing two documents purporting to express some basic CIJE ideas concerning change: a somewhat revised version of the piece by Dan Pekarsky that had already been sent out to participants; and a piece by Karen Barth, written some time ago, entitled "CIJE's Change Philosophy." (See **Appendix 1**) Below is a summary of some of responses to these documents:

1. The relationship between the "Building Blocks" document and the "CIJE Philosophy of Change" document was unclear to one participant.
2. There is a need to more effectively order the principles articulated in the Building Blocks document, so as to distinguish between philosophical commitments, strategic principles, and

other pertinent categories.

3. The Building Blocks document is insufficiently differentiated with respect to the different kinds of leaders involved in a change process (e.g. informal and formal, lay/professional), the respective roles of each, the relationship between the leadership-team and other constituencies in the process of identifying and coming together around a vision, etc. It was suggested that the distinction between a sales- and marketing-orientation among leaders would be pertinent to consider.

4. The Building Blocks document may suggest more orderliness than is characteristic of change-processes. Typically, even very successful processes are fairly messy and idiosyncratic. We should avoid language and metaphors that understate this messiness and suggest that change is clean, linear, and continuous.

5. The Building Blocks document could be taken to imply that the various tasks it identifies need to be addressed only once. In fact, many of the elements of a vital change process, (e.g. leadership, the nature of and buy-in to the vision, etc.) need to be returned to again and again. More radically, one person suggested that we should avoid thinking of the change-process as a whole as a one-time journey with a determinate beginning and end; rather, we should be thinking about institutionalizing a process that will be on-going.

6. We should not think that all of the conditions of change need to be in place for a meaningful change-process to be inaugurated. As Lizbeth Schor suggests in COMMON PURPOSE, it is often possible to develop those critical pre-conditions that are not initially present.

7. The "Why are we engaging in this time-consuming process?"-question needs to be revisited periodically during the process of change. Change is hard work, and along the way participants may lose sight of the purposes that have given rise to the process (with the result that they may grow disengaged or lose a sense of direction).

8. Because change is hard work, it is important that there be rewards for the participants along the way. These might range from opportunities to engage in serious Jewish study as part of the process (a strong perk for at least one participant!) to opportunities to implement certain do-able and meaningful changes early-on ("low-hanging fruit").

9. Who is change for?? These documents don't address the inreach/outreach issue. Is change aimed at those constituencies that are already actively involved -- or at the mass of individuals who are uninvolved? Typically, such processes are energized by those who are already very involved, and these folks tend to be individuals whose needs are already reasonably well met by the institution. A change-process organized by them is unlikely to meet the needs of, to draw in, the uninvolved. If our aim is "to bring people back", we must attend to this issue.

10. A vision must be palpable. Typically, the institutional/educational experience of most Jews in Jewish settings has been deadening and uninspiring. Progress requires a vision of something better; but for such a vision to take hold in the hearts of the critical stake holders, it has to be more real than rhetoric -- it must be palpable!! This means giving them powerful experiences through which they can "taste" the vision, experience it first-hand. Otherwise, there is a danger that they will aspire to no more than a somewhat improved version of the impoverished reality they have experienced.

11. Be sure not to confuse a vision with a vision-statement. At best a vision-statement is an articulation of an institution's living vision; at worst, it's a poor substitute.

12. The distinction between an institutional vision and the vision of an educated Jewish human being (or of a meaningful Jewish existence) that the institution is designed to encourage and support tends to be lost in these documents. There is insufficient emphasis on "existential vision" and its relationship to institutional vision in the synagogue-context. These matters need attention.

13. We should avoid viewing the institutional culture as an obstacle to change; we should try to identify the way in which it can be the ally of the change-process.

14. At least one participant encouraged us to revisit basic questions concerning why we believe synagogues need changing and to imagine a genuinely transformative vision. While not offering such a vision, she suggested that an adequate would need to respond to the deepest anxieties of our time and would interpret central Jewish categories in relation to them.

15. One participant asked us to consider the possibility that in practice - and perhaps in the ideal - synagogues feature more than one vision.

16. One participant discovered the following critical issues embedded in the documents:

a. **sustaining interest and involvement.** The idea of change may initially be very exciting. But the work is demanding and it takes a long time. Hence, the problem of sustaining interest and involvement.

b. **Meaningfully infusing powerful Jewish ideas.** It may be possible to engage the participants in a change process in serious Jewish study; but the encounter with powerful Jewish ideas, however meaningful to the participants, is no guarantee that these ideas will then infuse efforts to develop a guiding vision. Is there a way of introducing powerful Jewish ideas so that they do suffuse the change-process?

c. **The possibility of a powerful vision shared by diverse individuals.** In communities that feature substantial ideological diversity (for example, many synagogues), the development of a vision that is powerful, widely shared, and concrete enough to offer practical guidance may prove a difficult challenge.

d. **The problem of broad-based buy-in to the change process.** While it may be possible to generate high investment in the change-process among a core-constituency, it may be significantly more difficult to get a broad-base of buy-in from the membership of the institution. Can a change-process be successful without this broad buy-in? Are there ways of encouraging such buy-in?

e. **Readiness conditions.** Not all institutions will be ready for a serious change-process. What conditions need to be in place (or readily achievable) for a change-process to have a fighting chance of success?

f. **Role of "outsiders" in the process of change.** What role, if any, should be assigned to outside-facilitators in the process of change? How much and what kind of responsibility should they assume for guiding the process of change?

17. Enthusiasm was expressed for:

a. making Jewish learning and ideas central to the process

of identifying a guiding vision;

b. making learning/education both the vehicle and the aim of the change process (although, it was suggested, this idea needs greater emphasis).

18. Our discussion was punctuated by repeated and varied references to individual change. It was suggested that:

a. the ultimate goal of synagogue change-efforts is individual change -- facilitating deeper, richer, more spiritual experiences for the individuals who make up the institution's community.

b. change in individuals is integral to the process through which institutional change takes place.

c. there are significant and instructive parallels between individual change and institutional change.

#### DEVORA STEINMETZ'S SESSION ON JACOB

#18 offers a springboard to the session led by Devora Steinmetz, which focused on the transformation of Jacob around the time of his leaving Laban and his re-encounter with Esau. In examining Jacob's growth, we considered a number of themes and insights that may be pertinent to our work, including the following:

a. Jacob isn't entirely transformed; for better and/or for worse, some of the old survives in the new!

b. some of the continuity of the old and the new arises from the circumstance that Jacob changes alone; that is, those who surround him haven't undergone a similar process of change.

c. what makes Jacob capable of undergoing a series of changes is a larger sense of purpose (in relation to which specific goals and forms of conduct carry the experienced status of means/strategy).

d. change is painful and involves struggle.

e. outside catalysts may be necessary in order for significant change to come about.

## COMPARING APPROACHES TO SYNAGOGUE CHANGE

Following lunch, Karen Barth developed an evaluative comparison of three major synagogue-change projects -- the McKinsey Project she had been engaged with, the Experiment in Congregational Education, and Synagogues 2000. In each case, she sought to highlight the project's best and worst features.

### **MCKINSEY**

**Strengths.** Strong market-research. Excellent job of "listening to your customers" (i.e., congregants) via focus groups.

**Weaknesses.** Zero-content!! No new ideas are thrown into the mix, no taste of inspiring alternatives to what participants already know.

Karen notes that there is a need for strategic thinking between vision and implementation -- but it was, as I reviewed my notes, not clear to me whether this point was made in praise or in criticism of Mckinsey.

### **EXPERIMENT IN CONGREGATIONAL EDUCATION**

**Strengths.** There is a lot of fruitful interaction between synagogues. The mind-set of lay-people is central to the process ??? [what does she mean?]. Jewish learning is at the heart of both the aim and the process of change. ECE is very strong on "process"!

**Weaknesses.** Though ECE speaks of "communities of learners", it offers no clear vision of a thriving community of learners. In addition, ECE is weak on "content": there is no menu of programming or curriculum-content suggestive of what could be done differently.

### **SYNAGOGUE 2000**

SYNAGOGUE 2000 features two tracks , one Healing, the other Prayer. It's a two-year process. The first is designed to chart a change itinerary via a process of reflection and planning; the second is intended as an opportunity to implement a plan. As part of the kick-off year, participants undergo a powerful prayer-experience that offers them a sense of what's possible.

**Strengths.** Though weakly articulated [Explain!], the

experiential piece is very powerful.

**Weaknesses.** In part because of the experiential piece, there is a great gap between the central players in the change-process and the rest of the congregation. In addition, the actual change-process (intended for Year 2) is very weakly articulated.

After considering all three approaches, Karen notes one criticism that applies to all three: none of them addresses the skills needed by -- and needed to be cultivated in -- critical players (rabbis, cantors, educators, lay leaders, etc.)

### **ECE, WILLOW CREEK, AND INTERMEDIATE OPTIONS**

In our discussion of ECE, a contrast was drawn between its completely open-ended approach to vision and the highly specified approach to vision of Willow Creek, which has, in the spirit of McDonald's, offered franchise institutions very specific guidelines regarding guiding vision and week-to-week implementation.

We considered (what seemed to us to be) more congenial, intermediate positions:

a. target-institutions agree to certain general visional principles, with the understanding that they will be differentially interpreted by different institutions. This is close to the practice of the Coalition of Essential Schools.

b. Along the way to a vision, participants encounter and are encouraged to struggle with powerful questions and content that have the power to deepen and expand (without dictating) their thinking about an adequate guiding vision.

### **BARTH'S FIRST ITERATION OF A CIJE APPROACH TO SYNAGOGUE CHANGE**

For a careful account of Karen Barth's presentation of an approach to Synagogue-change, see Appendix 2. Comments evoked by her presentation are listed below:

1. Overall, the approach to Synagogue change she presented was greeted with enthusiasm. The sense of the group was that this was a great starting-point for the Think Tank's mission of emerging with a meaningful approach to change at the end of a year's time.

2. A couple of participants voiced the concern that the model did

not address the issue of governance sufficiently. (What is the group that steers the process? Who is it made up of? How are they chosen? What is the group's job? etc.)

3. The map and presentation that Karen offered look fairly linear, but the process itself is more web-like, with some activities going on simultaneously and some of them (like evaluation and the development of vision) going on indefinitely (alongside of, and feeding, other strands of the process). While Karen agreed with this critique, she added that in practice one often ends up doing one thing at a time, and she suggested that having a somewhat linear plan-of-action may be of value even if the process turns out to be very web-like.

Not only do some of the activities continue in an ongoing way, it was suggested by more than one participant that the process as a whole needs to be viewed not as an event in the life of the institution but as a way of thinking that becomes institutionalized.

4. Doubt was expressed concerning whether the process of study built into Karen's model would actually suffuse the effort to develop an institutional vision. It being possible that the activity of study, however rewarding, will be self-contained, one needs to ask: how structure the learning and/or the visioning so that these activities enrich one another?

5. It was reiterated that in the efforts to arrive at a meaningful vision, there should be opportunities to experience first-hand, to taste, richly meaningful forms of educational/Jewish experience that take the participants beyond what they have probably experienced in the past [in the way that, for example, participants in Synagogue 2000 were given the chance to undergo very powerful prayer-experiences]; otherwise, there is a strong probability that the possibilities entertained by those doing the visioning will be limited by their own, generally impoverished, past experiences in Jewish settings.

6. While the process articulated by Karen focused on the development of vision and on tracing out the implications of vision for practice, implementation itself was not strongly represented in her description. What provisions can be introduced to make it likely that practical efforts will follow or accompany efforts to articulate and think through the implications of a vision?

7. It was urged by one participant that the model must attend seriously to the gap that sometimes arises between "the leading-

vanguard" and the mass of constituents.

8. In the course of discussing Karen's approach, a kind of vision-continuum was articulated:

a. At one end, the vision is completely and totally in your hands. Sit together and come up with what you will!

b. At the other end, some outside expert or guru offers you a vision to work with, a vision which may vary in its specificity and openness to interpretation.

c. In the middle is a position that sounds like this: "it's your job to come up with your vision, but along the way you need to struggle with a particular body of content and questions."

9. In relation to the issues discussed in #6, the question was raised: how do movements like the Coalition or Essential Schools arrive at the broad-based visions that inform their own work?; and the answer seems to be, "There is no one answer to this question!" It was suggested that, in the case of the Coalition, its guiding principles originated with Sizer. In the case of Accelerated Schools, the guiding vision grew out of reflections on responses elicited by three questions:

a. Describe the dream-school for your own children and design a dream-school for children in an inner-city community. What are the similarities and differences between these schools?

b. What should every child be able to do and to know?

c. Describe a school that would meet your needs [as an educator or as a student??] as an adult.

10. In thinking about the upcoming work of our Think-Tank, it was suggested:

a. that it would be important to identify and make part of our own group the site-coordinator who will be charged with overseeing the pilot-projects to be launched next year.

b. that, in addition to following through on our original plan to look at some concrete cases of change and at approaches to change associated with different

realms of endeavor, it might make sense to launch some exploratory interventions this year, informed by the approach sketched out by Karen.

d. that "internal or inner work" should be a prominent dimension of our own work this year. That is, we should turn ourselves into a kind of focus-group that struggles to find our own answers to such questions as "What would an ideal Synagogue - the Synagogue that would meet our own needs as individuals and families - look like?" Or, if we were moving in a Sizer-direction, what would our own eight or ten guiding principles look like? Put differently, we should set before us and try to answer for ourselves relevant counterparts of the kinds of questions identified in #9.

11. A question was raised about the relationship between the work undertaken by this group and the work of Synagogue Change Research Project that Lisa Malik is steering. This matter needs to be clarified.

12. Someone underscored the importance of on-going documentation and evaluation of the process of change, evaluation conducted by both internal and external evaluators.